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AUTHOR	Eagon, Burdette; And Others
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ABSTRACT

This publication describes Wisconsin state level library services and their funding and presents recommendations related to state level resource providers, as required by Wisconsin Statutes, Chapter 347, Laws of 1979. Types of and the structure for providing statewide library services and resources are outlined, followed by a description of statutory, contractual, and other Wisconsin resource providers and their funding sources. A series of 17 recommendations are then presented, covering the designation of selected libraries to provide specialized backup interlibrary loan, information, and open access services to libraries and citizens in Wisconsin; the inclusion of a definition of a state level resource provider in the Wisconsin Statutes; the continued status of the Reference and Loan Library, the State Historical Society, the State Law Library, and the Legislative Reference Bureau as the only organizations with statutory responsiblities for statewide library services; funding for statutory and contractual state level resource providers; and related issues. Appendices contain copies of relevant Wisconsin statutes and describe the clientele, library collections, funding sources, and statewide document delivery, information/reference, and special services of statutory, contractual, and other Wisconsin state level resource providers. A list of assumptions and principles on which the recommendations are based concludes the report. (ESR)

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Report of the

Council on Library and Network Development

on

Funding for State Level Resource Providers

September, 1983

Bulletin No. 4150

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Preface

This report was approved by the Council on Library and Network Development on July 15, 1983. Members of the Council are:

Luis Antonio Baez, citizen member, Milwaukee
Douglas Baker, Director, Northwest Library System, Ashland
Carol Diehl, Library Media Director, New London Public Schools, New London
Burdette W. Eagon, Dean, Academic Support Programs, University of Wisconsin, Stevens Point
Ruth E. Harris, citizen member, Eau Claire
Phillip Martell, Public Library Trustee, Marinette
Venora McKinney, Deputy City Librarian, Milwaukee
Eugene G. McLane, Director, Fond du Lac Public Library and Mid-Wisconsin Library System
Victor Pagenkopf, citizen member, Platteville
Audrey Robertz, citizen member, Madison
Ruth Schmidt, citizen member, Elkhart Lake
James Stauff, citizen member, Janesville
Barbara Warren, citizen member, Madison
William Wilson, Assistant Administrator, Winding Rivers Library System, La Crosse

The report was prepared for the Council by a Subcommittee on State Level Library Resource Providers: Burdette Eagon, Chair; Henry Bates*, Director, Milwaukee Public Library; Janice Beaudin*, Librarian, University of Wisconsin, Madison; and Jacqulyn Shropshire*, citizen member, Milwaukee.

Peg Branson was staff liaison from the Wisconsin Department of Public Instruction, Division for Library Services.

The Council on Library and Network Development is advisory to the Wisconsin Department of Public Instruction and the Division for Library Services.

*COLAND term ended in June, 1983.

Introduction

This report was completed in response to the directive of Wisconsin Statutes, Chapter 347, Laws of 1979 which states:

> "The council on library and network development shall study funding for state level library information resource providers and make recommendations to the state superintendent of public instruction. The council shall make its recommendations and the state superintendent shall transmit the recommendations to the governor and legislature by December 31, 1982."

A variety of formal and informal arrangements exist in Wisconsin for the sharing of materials and information among libraries of all types, including public libraries and libraries in schools, colleges, universities, technical schools, state agencies, hospitals and other organizations, both public and private. These arrangements are sometimes local in nature. At other times they involve libraries from throughout the state. Sharing arrangements exist either among a single type of library, such as a public library, or involve several types of libraries, for example, school, public and college libraries.

Three of the primary ways of sharing materials and information among libraries are interlibrary loan, information or reference services, and open access services. The rationale for developing these services is: (1) the amount, quality and variety of materials available to all Wisconsin library users can be increased; (2) costly and unnecessary duplication can be avoided; (3) better use of existing materials can be made; (4) materials from around the state can be acquired in a timely fashion; and, most importantly, (5) Wisconsin residents in all areas of the state can have access to information and library materials on an equitable basis.

Judicious use of library resources is particularly important in times of budgetary constraints and reductions. Since libraries cannot possibly afford to buy all of the materials that may be needed by their patrons, sharing materials is an alternative to buying infrequently used or other needed materials. The cost to share materials may, in many instances, be less than the cost to buy and store materials.

Because of the scope and nature of their collections and services, as well as and their legal responsibilities, some libraries and organizations are important on a statewide basis. Large public libraries, such as Milwaukee Public Library, the University of Wisconsin System libraries, especially UW-Madison Libraries, the State Historical Society Library and the Reference and Loan Library receive substantial numbers of requests for services from libraries and individuals in Wisconsin. There are also other libraries in the state which do not necessarily receive large volumes of requests, but are recognized sources of very specialized and important materials and do serve libraries and citizens from around the state.

The goal of library service in general is to provide people with needed materials and information. Sometimes this goal can be met through one library. Sharing of materials and information among a variety of libraries is another means of reaching this goal. While availability of materials and information, including access through library sharing arrangements, is considered to be necessary in a democratic society, it is not without cost or problems. This report looks at state level resource providers in terms of services offered, responsibilities, clientele served, relationships to one another and funding sources and amounts. A number of issues and concerns are raised for which specific recommendations are made. In some cases problems are discussed and suggestions or recommendations for future study are made.

I. STATE LEVEL LIBRARY SERVICES

A. OVERVIEW OF STATE LEVEL LIBRARY SERVICES

The information needs of today's citizens require a diversity of resources and services. There are similarities and general agreement on the types of resources and services that are or should be provided at the state level by all states. There is, however, no one standard or recommended structure for carrying out these state level library services.

Types of Services and Resources

Among the state level services offered by many states, including Wisconsin, are:

- reference, bibliographic and interlibrary loan service to supplement service offered by community and area level libraries
- a general collection of sufficient size and scope to supplement and reinforce resources of other libraries
- a full range of reading materials for the blind and physically handicapped
- a collection of state documents and documents of comparable states plus a strong collection of federal and local documents
- information and reference service for government agencies and courts
- information and research service for the legislative branch of government
- a law collection of primary and secondary legal materials
- a collection of history related to the state
- an archival program for the preservation and organization of the state's own records and records of local government
- specialized working libraries in divisions and agencies of goverment
- a collection of health science materials

Important factors that influence the size and depth of collections and range and types of services offered at the state level in various states are: (1) the availability of lists of books or other materials which identify where materials are owned; (2) the strengths and types of individual libraries around the state; (3) the availability of area level library services such as those offered by public library systems, health science consortia and other area organizations; (4) the types and amounts of reimbursement and library funding; and (5) the availability of delivery services and automation activities in libraries.

Structure for Providing Services and Resources

State governments have developed in different ways, at different times and to different extents. Thus, history and tradition have played a large part in the organizational framework within which state level library services are provided in different states.

In some states, for example, a central state agency or library has responsibility for historical collections, archival resources, legislative information and legal materials. In other cases, separate agencies or units of government provide these and other services. Sometimes states contract for specific resources and services with other libraries within or outside the state.

In Wisconsin, no one library or agency has responsibility for providing all state level library services. Instead, state level library services are carried out by a variety of libraries in a variety of ways. There are libraries in Wisconsin with statutory responsibility for statewide library services. There are libraries providing statewide services because of contractual arrangements with state agencies. There are libraries providing statewide services simply because they have historically been willing to respond to the requests for materials or information which have come to them. These various formal and informal arrangements for services have developed and evolved over the years with no overall or coordinating authority.

Statutory Wisconsin Resource Providers

Although there is no statutory definition in Wisconsin statutes of a state level resource provider, four libraries in the state do have statutory responsibilities for statewide services. These are:

Legislative Reference Bureau (13.92(1))
Reference and Loan Library (43.05(11)43.03(7))
State Historical Society (44.015 (2-3); 44.02 (1-2) (5-9) (15-16); 43.03 (1-3) (6); 44.04 (1-2); 44.06 (1-5); 44.07 (2); 44.09; 44.10 (1-2); 44.11;44.14 (1-4))
State Law Library (758.01)

(See Appendix A for statutory citations.)

Contractual Wisconsin Resource Providers

The Department of Public Instruction and the University of Wisconsin System also contract with selected other libraries or agencies in Wisconsin to provide designated statewide services on a contractual basis. These libraries and agencies are:

Cooperative Children's Book Center (UW-Madison)*
Milwaukee Public Library*
WILS (UW-Madison)*
WILS (Council of Wisconsin Librarians)**
Wisconsin Regional Library for the Blind and Physically Handicapped (Milwaukee Public Library)*

* Contracts through the Department of Public Instruction
** Contract through the UW System

One of the DPI contracts for service is required in statutes. According to 43.03(6), Wis. Stats., the DPI must contract with the public library in a first class city for provision of library services to the blind and physically handicapped. Milwaukee Public Library thus houses and administers the Wisconsin Regional Library for the Blind and Physically Handicapped. Section 43.03(7), Wis. Stats., is more general. It enables the DPI to contract with any library in Wisconsin or out-of-state for specialized library materials and information. The other DPI contracts are made under this enabling legislation. The DPI contract for services from the Cooperative Children's Book Center is with the UW-Madison. The DPI contract for services from WILS (Wisconsin Interlibrary Services) is with UW-Madison*. The UW - System contract for services from WILS is with the Council of Wisconsin Libraries.

Other Wisconsin Resource Providers

In addition to the statutory and contractual resource providers there are also a number of other libraries from around the state that provide library services such as interlibrary loan, reference or information services and open access to libraries in the state on a statewide basis. These libraries do not have statutory statewide service responsibilities. They do not receive state funds through contractual arrangements and often do not have statewide services as their primary mission. Included in this category are such libraries as state agency libraries, libraries on the UW-Madison campus, other UW System libraries, public library system resource libraries, some private academic libraries and some special libraries, such as those in business and industry. These libraries are providing statewide library services in response to requests received. The fact that these libraries are receiving requests for services and are filling them without compensation may indicate that there are gaps in the state level library services that are provided through statutory and contractual arrangements.

At least two primarily fee-based services have developed to provide statewide library services. These are the Wisconsin Dissemination Project (WDP) in the Department of Public Instruction and Information Services Division (ISD) on the UW-Madison campus. WDP is an information service for K-12 educators. It is a part of the Division for Library Services, Bureau of Instructional Media and Technology. WDP provides online data base searching and some other reference services for school districts in Wisconsin as well as for DPI staff. ISD serves the information needs of Wisconsin business and industry. Under the auspices of UW-Madison College of Engineering and the University Industry Research program, ISD draws upon the University's scientific and technical libraries and faculty expertise. ISD provides a full range of services and in-depth information which may not be locally available to business and industrial personnel.

*NOTE: WILS is an operating unit of the Council of Wisconsin Libraries, a nonprofit educational corporation. WILS is located in the UW-Madison Memorial Library and, under an arrangement with that Library, provides the staff which locates, retrieves and transmits materials and information to libraries around the state.

B. FUNDING FOR STATE LEVEL LIBRARY SERVICES

The economy has influenced funding of state level library services in a number of ways. For one thing, as the costs of purchasing, processing and storing books and other materials have gone up, borrowing and other sharing arrangements have become more attractive alternatives. Thus, the amount of traffic for these services has increased greatly. On the other hand, because of decreasing library budgets in the present tight economy, libraries are less willing to share their resources without what they perceive to be adequate reimbursement. Much more attention is being paid to sources of funding for services and appropriate responsibliities of the various levels of government, for example, local and state government, in providing services.

Funding for resource sharing activities such as interlibrary loan, open access and reference or information services at the state or area level comes from a variety of sources. It is determined by a variety of funding formulas and varies by type of library and from area to area across the state. Included in the costs for these services at local, area and state levels are personnel, telecommunications, delivery, supplies, purchase of new materials, wear and tear on materials, operational overhead, etc. It is not possible to determine an accurate cost for these services statewide since no common method of determining and documenting costs is used. Following is a look at some of the sources as well as the amounts of money used to pay for these services. A brief overview of area level funding is included because state money is used to pay for some services at this level.

Area Level Funding

Sources used to pay for resource sharing activities at the area level include state money through public library systems or directly, county money, local money, federal funds (usually for start-up costs or one-time only costs), and fees charged for services. Reciprocal arrangements where no money is actually exchanged are common.

Public library system state aids (Wis. Stats. 43.24) are often used to reimburse system resource libraries for use of their collections by other libraries. Sometimes public library system aids are used to hire the staff to provide interloan and information services; other times systems contract with resource libraries to provide the staffing needed for such services. A variety of formulas are used in systems throughout the state to determine reimbursement rates for these services. Most of the libraries which are state funded, such as university system libraries and some school libraries, do not receive these state funds specifically for services to other libraries in their areas or the state.

Many libraries at the area level do not receive reimbursement for the cost of lending materials or providing information to other libraries. These costs are absorbed in the library's regular operating budget. Often libraries are willing to absorb these costs if they in turn are able to get materials from other libraries without paying fees. Problems with such reciprocal arrangements arise when there are major imbalances between giving and receiving. Some libraries which are major lenders do not feel they can afford to absorb the costs internally. As mentioned

above, public library system resource libraries, which are major lenders within areas, are often reimbursed with state aids to share materials with other libraries. This is not necessarily true of other libraries which may also lend more than they borrow within an area. For example, some UW-System libraries lend more within their areas than they borrow and do not necessarily receive reimbursement.

Usually libraries do not charge patrons for interlibrary loan, information and open access services, except perhaps for photocopies of articles or charges for computer data base searches.

State Level Funding

Several sources are used to pay for state level library services: state funds (provided by various sources either directly or through contractual arrangements); reciprocal arrangements, where no money is exchanged, and fees charged for services.

Statutory Wisconsin Resource Providers

The four libraries with statutory responsibilities to serve the state receive state funds through four different agencies: the State Historical Society, Department of Public Instruction (Reference and Loan Library), Supreme Court (State Law Library) and Legislative Reference Bureau.

Statutory State Level Resource Providers	1982/83 State Budget Appropriation	Statewide Services
Legislative Reference Bureau	$993,900	See pages 23-25
Reference and Loan	$866,700	See pages 25-28
State Historical Society Library	$815,246	See pages 28-33
State Law Library	$307,100	See pages 33-34

The primary responsibility of the Reference and Loan Library is statewide service to other libraries. The State Historical Society has responsibility for serving University of Wisconsin students and other individuals who use the library directly, as well as libraries in the state. The State Law Library has primary responsibility for serving the Supreme Court and Court of Appeals; however, the Law Library also serves attorneys, judges, legislative and state agency personnel and the general public. The Legislative Reference Bureau's primary mission is to serve the legislature, although the Bureau's library collection is open to the general public.

Contractual Wisconsin Resource Providers

The four libraries with contractual arrangements with the Department of Public Instruction receive state funds for statewide service through DPI. The UW System contract with Council of Wisconsin Libraries/WILS does not involve the direct exchange of money from a single source. Rather, individual participating libraries are assessed a fee based on services used. The $193,732 amount is the amount paid by 48 participating academic libraries, including UW System libraries, private academic libraries, and other special libraries.

Contractual State Level Resource Providers	Amount of Contracts 1982/83	Statewide Services
Cooperative Children's Book Center	$ 43,350	See pages 34-36
Milwaukee Public	$138,700	See page 36
WILS (UW-Madison)	$ 99,100	See pages 37-38
WILS (COWL)	$193,732	See pages 37-38
Wisconsin Regional Library for the Blind and Physically Handicapped	$348,700	See page 39

As a part of this study of state level resource providers, an attempt was made to compare the cost of providing interlibrary loan and reference services from the Reference and Loan Library and the Department of Public Instruction contracts with Milwaukee Public and UW-Madison/WILS. Since 1982/83 is the first year an attempt was made to figure comparable costs, these costs still need further refinement to be considered accurate and are not yet available. Further comparisons need to be made to assure that interloan is being provided in as cost effective a manner as possible and that compensation is equitable.

In addition to the state contractual funds and fees mentioned above, the UW-Madison Libraries receive state funds through the UW budget specifically to maintain their collections as statewide resources. This collection development money is given in recognition that these libraries have some of the major primary research collections in the state. This money is available only for the purchase of materials, not for the staff to process them or make them available to users.

Other Wisconsin Resource Providers

The Wisconsin Dissemination Project (WDP) provides statewide data base and reference services to K-12 educators for a fee. DPI provides state funding for staff, office support and some miscellaneous materials for WDP. Costs for data base searching are then met primarily through subscription fees paid by local school districts. Support for WDP services

is also provided by some CESAs which serve as regional centers for WDP and provide staff support for searching and outreach. These CESAs also receive partial cost recovery from the local school district subscriptions. Dependence on subscription fees means that access to information is not equal across all the school districts of the state.

There are also some libraries in the state which serve libraries and citizens from throughout the state, but do not receive state funds designated for this service. For example, the UW-Madison, Middleton Health Sciences Library, is a provider of materials and information to public libraries through Reference and Loan and to the general public directly, but it receives no specific compensation for this service.

Public library system resource libraries receive requests from Reference and Loan Library, on behalf of other libraries in the state, which Reference and Loan Library is unable to fill. These resource libraries receive no reimbursement for filling these requests nor are they charged a fee for service from Reference and Loan.

Libraries participating in the Council of Wisconsin Libraries/WILS service on the UW-Madison campus receive requests from WILS, on behalf of other libraries in the state, which WILS is unable to fill. These libraries do not receive monetary reimbursement for filling these requests, but do receive reimbursement credits towards their WILS fee assessment.

The Department of Public Instruction has a purchase order with the UW-Madison Engineering Library for access to computerized data bases that the Reference and Loan Library is unable to provide. The amount of this purchase order for 1982-83 is $7,000.

The Information Services Division (ISD) provides reference and other information services, including access to computer data bases, to business and industry. Fees vary according to the complexity of a request. Some requests are answered without charge. UW-Madison College of Engineering and the University Industry Research program provide funding for ISD staff. ISD staff have access to the materials and information available on the UW-Madison campus and elsewhere as the need arises. Costs for data base searches and other services are paid primarily by fees assessed users.

II. STUDY RECOMMENDATIONS AND COMMENTS

Recommendation #1:

It is recommended that selected libraries be designated in statutes or contractual arrangements to provide specialized backup interlibrary loan, information and open access services to libraries and citizens in Wisconsin and that these libraries be called state level resource providers.

Comment:

There are needs for materials and information which cannot, and in many cases perhaps should not, be met locally or within an area of the state. It is more cost effective and efficient to designate selected libraries to backstop requests for materials or information from libraries and library patrons throughout the state than to provide specialized materials and information at numerous libraries throughout the state.

Recommendation #2:

It is recommended that a definition of state level resource providers be developed and that it be included in Chapter 43 of the Wisconsin Statutes. The proposed definition is as follows:

A state level resource provider is a library or organization which has been designated by the state and receives state funds to provide any of the following services: interlibrary loan services, information services and/or open access services to Wisconsin citizens, either directly or through libraries. The state can designate such libraries in statute or contract. Criteria for selection of libraries can include, but is not limited to:

-- the size of a library's collection
-- the availability of the materials or information in a library's collection or information sources for statewide use
-- the specialized subject matter of the materials in a library's collection or information sources
-- demand for the materials or information contained in a library's collection or information sources
-- expertise of staff in specialized areas

Comment:

It is sometimes difficult to determine which libraries have statutory responsibilities for statewide services because references to such libraries are contained in four different sections of the statutes. There is no section or chapter which lists or cites the four libraries having statutory statewide service responsibilities.

Recommendation #3:

It is recommended that the Reference and Loan Library, State Historical Society, State Law Library and Legislative Reference Bureau continue to have statutory responsibilities for statewide library services. It is recommended that no additional libraries be given such statutory responsibilities at this time.

Comment:

Further study would be needed before additional libraries could be recommended to be given statutory responsibilities.

Recommendation #4:

It is recommended that no additional libraries be designated in statutes to have contractual arrangements with the state for statewide services.

Comment:

Section 43.03(6), Wis. Stats., specifies that there be an annual contract between the DPI and Milwaukee Public Library for provision of library services to the blind and physically handicapped. Section 43.03(7) enables the DPI to contract for service with libraries and other resource providers in and outside of Wisconsin. The DPI should continue to have the flexibility provided in 43.03(7).

Recommendation #5:

It is recommended that the responsibilities and services of statutory state level resource providers be clearly defined and stated in statutes and be listed in Chapter 43.

Comment:

The statutes vary greatly in the amount of detail provided describing the responsibilities of the four organizations currently given state level responsibilities. For example, sections on the State Historical Society and the Legislative Reference Bureau list specific functions, while those on the Reference and Loan Library and State Law Library are very general. Although general statements may allow for flexibility and change, needed services may be eliminated if there are not enough specifics, since they are not "required" or because it is not certain what the "intent" of the legislature" was. In this case it would appear to be desirable and appropriate that services or responsibilities which require identifiable financial commitments, and are widely agreed upon as needed, be specifically designated in the statutes.

Recommendation #6:

It is recommended that the funding for statutory state level resource providers be adequate to carry out mandated responsibilities.

Comment:

In several cases, statutory resource providers have not been able to provide all the services required in the statutes in a reasonable manner or at an adequate level. It has been possible to utilize the flexibility inherent in general statutory language to redefine or eliminate some services and this has been done. In the last year, costs have been compiled for providing basic services through both statutory and contractual resource providers. In meetings conducted by the Council of Wisconsin Libraries, librarians have placed a top priority on the timeliness of of responses concerning interloan requests.

Funding should be adequate to allow staff to verify bibliographic information, search items on the shelves, or research a reference question and prepare items for the mail within a reasonable time period (2-4 days). Referrals and delivery will still require additional time.

Recommendation #7:

It is recommended that the effectiveness and ability of statutory state level resource providers to provide services be regularly assessed and evaluated by the Council on Library and Network Development with input from the Wisconsin library community and library users.

Comment:

Since a variety of libraries and organizations are providing state level library services in Wisconsin, it is important for some agency to have responsibility for coordinating these services to the extent possible.

Recommendation #8:

It is recommended that the need for and effectiveness of specific contractual arrangements for statewide services be regularly assessed and evaluated by the Council on Library and Network Development and revised if necessary.

Comment:

Sometimes it is more efficient and cost effective for the state to contract for specialized statewide services than to provide these services directly. Assessing the advantages of direct services versus contractual arrangements requires a continual evaluation of changing conditions and service demands.

Recommendation #9:

It is recommended that the DPI have contracts for services with libraries which do not have a statutory responsibility for providing service statewide, but which have collections in very specialized subject areas which are needed and in demand.

Comment:

Some libraries may be providing important statewide services, but are not being compensated or recognized for those services. There are indications that some libraries provide far more than they borrow from other libraries statewide.

The contracts should specify the anticipated volume of traffic and a predetermined cost per transaction. The contracts should differentiate between interloan of identified items and reference or information services.

Recommendation #10:

It is recommended that the reference services component in the Department of Public Instruction contract with UW-Madison/WILS be expanded to provide for the use of the specialized skills of staff in Madison campus libraries. When staff resources are utilized, the campus libraries should be compensated through the contract.

Comment:

Currently, the Division for Library Services contract with the UW-Madison/WILS provides for services of a WILS reference librarian, not for services of librarians in individual Madison campus libraries. The Division for Library Services has a purchase order with the Engineering Library on the UW-Madison campus for reference services and data base services. The Middleton Health Science Library handles reference requests from Reference and Loan but receives no compensation. It would be more efficient for the DLS to have one contract with the UW-Madison which would provide access as needed to specialized reference staff in Madison campus libraries.

Recommendation #11:

It is recommended that the Division for Library Services do the following: identify the libraries providing "significant" statewide service; explore the need for a definition or criteria for these "statewide library resource providers"; and explore that the possibilities and the need for reimbursing or compensating these providers.

Comment:

Within public library system areas, the larger public libraries are often reimbursed with system state aids for lending their materials and providing information to other libraries. Reports such as the Report of the Council on Library and Network Development on Regional Organizations for Interlibrary Cooperation and Resource Sharing have suggested that if public library systems were expanded to be multitype and to also include school, academic and special libraries, then major providers of materials and information within areas, regardless of type of library, could be compenstated with multitype system money for their services.

There appears to be general agreement that major providers of materials and information beyond system areas on a statewide basis should also be compenstated. A definition of "significant"provider needs to be determined and the number of libraries in that category needs to be identified. One possible way to provide compensation to these libraries would be to expand the number of contracts the DPI and UW System now have to include all or major statewide library resource providers or to develop a payment to netlender program of some kind. Differences in responsibilities and funding for statewide lending and area lending would need to be clarified.

Recommendation #12:

It is recommended that the funding for contractual state level resource providers be adequate to carry out contractual responsibilities and be determined on an equitable basis. Cost elements should be identified and applied to each situation. All costs necessary to supply specified statewide service should be reimbursed through the contracts unless otherwise paid for through state funds.

Comment:

The Department of Public Instruction contracts with Milwaukee Public Library and UW-Madison/WILS have been negotiated by the Division for Library Services in conjunction with the state budget process. Cost elements have not been determined using a common methodology and the costs have not been easy to compare. The funding levels have been inadequate to pay for needed services.

In 1979, Milwaukee Public Library notified the Division for Library Services that reference services could no longer be provided at the funding level allocated. Milwaukee Public Library is the best source of reference information in such areas as standards, Milwaukee area business and Milwaukee area history.

In 1981, WILS was forced to place a quota on the number of requests referred from the Reference and Loan Library. In order to stay within the quota, Reference and Loan referred only requests for which UW-Madison campus holdings could be verified. In 1982/83 funds allocated by the legislature were insufficient and additional funds were needed to cover an estimated 3,000 additional requests.

Recommendation #13:

It is recommended that the relationship between and among state level resource providers be clearly defined and coordinated as much as possible.

The Council on Library and Network Development should convene a meeting of representatives of both statutory and contractual resource providers at least once a year to discuss the means by which statutory responsibilities are carried out and to look at the following areas in a continual long-range planning effort:

Collection development
Patterns of services
Costs of services
Use of new technologies

Comment:

One forum for discussion of the relationships among state level resource providers has been the negotiation process for contracts. This process has been limiting in that it has only involved one-on-one contact between the Department of Public Instruction and its individual resource providers. Other statutory state level resource providers have not been included.

Recommendation #14:

It is recommended that the following use of computerization or new technology be further planned for, coordinated and funded. Planning should include a continuous evaluation and assessment of the effect of new technologies on library services in general, and resource sharing in particular.

1. Statewide Data Base (WISCAT)
2. Data Base Search Services
3. Telecommunications
4. Telefacsimile

Comment:

Advances in computerization, telecommunications, and other technologies will have far-reaching effects on the ways in which information is collected, organized and transmitted to library users. Appropriate technologies to improve resource sharing among libraries should be planned for and implemented at the state level. This will assure that technologies are used cost effectively and that hardware and software incompatibilities are eliminated as much as possible. The use of new technologies may involve substantial one time investments as well as on-going costs.

Recommendation #15:

It is recommended that the DPI support the professional reference needs of K-12 educators and administrators. This could include access to the specialized education research and development materials which are often available through on-line data bases.

Comment:

There are differences in the services and access to services offered by state level resource providers to various types of libraries in the state, and thus library users. These inconsistencies sometimes create barriers to access to materials and information by users. The Reference and Loan Library has a collection primarily geared to the needs of public libraries. The collections on the UW-Madison campus are a primary resource for college and university libraries around the state. There are statutory and contractual resource providers with materials and information to meet the needs of school personnel. However, there are gaps in coverage and in access to these services.

Recommendation #16:

It is recommended that DPI continue to support full participation of school libraries in area networking activities and in planning for the development of multitype library systems, in order to ensure that efficient and equitable channels for acquiring materials are available to school personnel and that materials in schools are available to other libraries through interlibrary loan.

Comment:

School libraries are often encouraged to access state level libraries through public libraries and public library systems even though they cannot be members of systems and thus do not have a "voice" in policy development. Patterns for two-way sharing have not yet been developed in many areas.

Recommendation #17:

It is recommended that the possibility of centralizing the allocation of dollars for interloan and reference services for UW System libraries from WILS be explored and that the possibility of state funding of access for K-12 education professionals to state level materials and information be explored.

Comment:

There are differences in the methods of payment for services provided by state level resource providers. Some providers assess fees; other don't. These differences sometimes create unequal and uneven access to materials and information by Wisconsin library users and sometimes promote inefficient or unnecessary sharing patterns.

Appendix A

STATUTORY CITATIONS OF WISCONSIN STATE LEVEL RESOURCE PROVIDERS

Legislative Reference Bureau
13.92(1)

13.92 Legislative reference bureau. There is created a bureau to be known as the "Legislative Reference Bureau," headed by the chief of legislative reference bureau under the classified service. The legislative reference bureau shall be strictly nonpartisan and shall at all times observe the confidential nature of the reference or drafting requests received by it.

(1) DUTIES OF THE BUREAU. (a) *Reference section.* The legislative reference bureau shall perform reference services for all members of the legislature equally and impartially and to the limits of its facilities and staff. Such reference services shall be available also to public officials, students of government and citizens generally. In the performance of its reference services, the bureau shall:

1. Collect, index and make available in the most suitable form to legislators, other public officials, students of government and citizens generally, information relative to governmental subjects which will aid the legislature, other public officials and the citizens generally, to perform their duties in the most efficient and economical manner.

2. Maintain an adequate collection of public documents of Wisconsin and other states and carry out loan arrangements with libraries.

3. Maintain the drafting records of legislation introduced in prior sessions of the legislature and utilize such records to provide information on questions of legislative intent. Such records shall be retained in the capitol building at all times.

4. Utilize the materials assembled in its collection and other suitable materials to prepare studies and reports providing pertinent information regarding subjects which are or may become items of concern to the legislature, other public officials or the public generally, and where warranted publish such reports and studies in the most expeditious manner.

5. Prepare copy for the biennial Wisconsin Blue Book.

(b) *Drafting section.* The legislative reference bureau shall provide drafting services equally and impartially and to the limits of its facilities and staff. In the performance of its drafting services, the bureau shall:

1. Prepare in the proper form all legislation to be introduced in the legislature.

2. Prepare in plain language an analysis of each original measure, to be printed with the measure when it is introduced. On the printed measure, the analysis shall be displayed single-spaced between the title and the enacting clause.

3. As a service to the senate and assembly, and as directed by the chief clerks thereof, enroll all measures passed by the legislature.

a. Promptly after the passage of any bill, any joint resolution amending the constitution, or any other resolution determined by the chief clerks to require enrollment and, in the case of a bill, before it is presented to the governor for approval, the chief clerk of the house in which the measure originated shall deliver the jacket to the bureau which shall enroll the proposal and return the jacket and the required number of copies, including a camera-ready copy of any proposed constitutional amendment and each resolution requiring newspaper publication, to the chief clerk. The camera-ready original of the enrolled proposal shall be retained in the bureau.

b. Of the copies delivered to the chief clerk, one copy shall be used as the official enrolled measure to be authenticated as provided by the rules and, in the case of an enrolled bill, be submitted to the governor for his approval. The remaining copies shall be distributed as provided by the rules and as determined by the chief clerks.

c. Each enrolled proposal, or printed copy thereof, shall carry a heading "State of Wisconsin" as do bills and joint resolutions.

Legislat.ve Reference Bure.u
13.92(1) (continued)

d. No later than the next working day following the deposit of the act in the secretary of state's office, the secretary of state shall inform the bureau of the act number, date of enactment and the date of publication under s. 35.095. The bureau shall enter the act number, date of enactment and date of publication on the camera-ready copy and deliver it to the contract printer for reproduction. The copy shall identify material deleted from existing law by stricken type, and material inserted into existing law by underscored type. In any act published "vetoed in part", the material subject to the veto shall be displayed in full but shall be identified by distinguishing marks.

e. Printed copies shall be available on or before the date of publication of the act.

f. The number of copies printed, and the quality of paper used, shall be as provided in the joint rules and as further determined by the joint committee on legislative organization.

(c) *Drafting records; when confidential.* While the legislature remains in session the drafting section shall maintain the files for all drafting requests received during such session, but after final adjournment the drafting records to legislation introduced shall be turned over to the reference section under par. (a) 3. Records of drafting requests which did not result in legislation introduced shall remain confidential at all times and may be maintained by the drafting section in such form as will facilitate its operations.

(d) *Legislative computer use.* The legislative reference bureau shall:

1. Coordinate and administer the scheduling and use of computer programs and machine time to facilitate application of computer and other modern office machine technology by both houses of the legislature and the legislative service agencies under this subchapter.

2. Subject to review by the department of administration under s. 16.97, and approval by the joint committee on legislative organization, provide and maintain a data system to meet legislative needs for text searching, text processing and records keeping.

(e) *Legislative printing.* Payments for the following costs shall be administered by the legislative reference bureau:

1. Providing duplicating services to the legislature and its service agencies.

2. Printing of legislative proposals or amendments and, when so ordered by either house, engrossed or enrolled proposals, under s. 35.05.

3. Printing of session laws under s. 35.15 and publication of acts under s. 35.095.

4. Printing of the Wisconsin Blue Book under s. 35.24.

(2) DUTIES OF THE CHIEF. The chief of the legislative reference bureau shall:

(a) Employ under the classified service, and supervise and train the personnel assigned to him.

(b) Supervise all expenditures of the legislative reference bureau.

(c) Serve as editor of the biennial Wisconsin Blue Book.

(d) Co-operate with the legislative service agencies of other states and foreign countries toward the better exchange of information.

(e) Attend all meetings of the commission on interstate co-operation under s. 13.54 and the midwest and national meetings in which the commission participates.

(f) Attend, by himself or through a professional employe under sub. (1)(b) designated by him, all meetings of the commission on uniform state laws under s. 13.55 and the midwest and national meetings in which the commission participates.

(g) Cooperate with the revisor of statutes in systematically examining and revising the statutes and session laws under s. 13.93 (2) (j).

History: 1971 c. 270 s. 104; 1973 c. 90, 333; 1975 c. 41 s. 52; 1975 c. 199, 266; 1977 c. 29; 1977 c. 196 s. 131; 1979 c. 110, 204; 1981 c. 372.

Reports or comments of nonlegislative committee are considered valid aid in interpreting statute which originated from such committee. In re Estate of Haese, 80 W (2d) 285, 259 NW (2d) 54.

Reference and Loan Library
43.05(11) and 43.03(6)(7)

43.05 General duties of the division. The division shall:

(11) Maintain a library to supplement the collections of public libraries, public library systems, regional resource centers and other types of libraries with specialized materials and information sources that are not appropriately held by such libraries, systems or centers and are not readily available from other resource providers, and to provide library lending services to state government.

43.03 General duties of state superintendent. The state superintendent shall:

(6) Enter into an annual contract with the public library in a 1st class city for the provision of library services to physically handicapped persons, including the blind and visually handicapped, certified by competent authority as unable to read or use conventional printed materials as a result of physical limitations. For the purpose of this subsection, "competent authority" means any member of the medical or allied professions, and professional persons in the fields of public health, education, library service, rehabilitation, social work and public welfare.

(7) Contract for service with libraries and other resource providers in and outside of this state to serve as resources of specialized library materials and information not available in public libraries or the reference and loan library.

State Historical Society
44.015(2-3), 44.02(1-2)(5-9)(15-16), 43.03(1-3)(6), 44.04(1-2), 44.06(1-5)
44.07(2), 44.09, 44.10(1-2), 44.11, 44.14(1-4)

44.015 Powers. The historical society may:

(2) Sell, exchange or otherwise dispose of duplicate books, periodicals or museum objects, or books, periodicals and museum objects outside its field of collection.

(3) Accept collections of private manuscripts, printed materials, tapes, films and artifacts, and it may enforce any and all reasonable restrictions on accessibility to the public, use or duplication of said collections which are agreed upon by the donor and the historical society.

44.02 Historical society; duties. The historical society shall:

(1) Serve as trustee of the state in the preservation and care of all records, both printed and written, and all articles and other materials of historic interest and significance placed in its custody, and interest itself constructively as the agent of the state in the preservation and care of all similar materials wherever they may be.

(2) Collect by gift, exchange or purchase books, periodicals, pamphlets, records, tracts, manuscripts, maps, charts and other papers, artifacts, relics, paintings, photographs and other materials illustrative of the history of this state in particular and of the West generally.

(5) Keep its main library and museum rooms open at all reasonable hours on business days for the reception of the citizens of this state who may wish to visit the same, without fee; except that the society may collect a fee for admission to historic sites or buildings acquired, leased or operated by the society elsewhere in the state, including areas within state parks or on other state-owned lands which incorporate historic buildings, restorations, museums or remains and which are operated by the society by agreement with the department of natural resources or other departments, or for lectures, pageants or similar special events, or for admission to defray the costs of special exhibits in its several buildings of documents, objects or other materials not part of the society's regular collections but brought in on loan from other sources for such special exhibitions. The society may also procure and sell or otherwise dispose of postcards, souvenirs and other appropriate merchandise to help defray the costs of operating its several plants and projects.

(6) Thoroughly catalog the entire collections of said society for the more convenient reference of all persons who have occasion to consult the same.

State Historical Society

44.02 (cont.)

(7) Loan, for such periods and under such rules and restrictions as it may adopt, to libraries, educational institutions and other organizations or to private individuals in good standing, such books, pamphlets, museum objects, or other materials that if lost or destroyed could easily and without much expense be replaced. No work on genealogy, no newspaper file, or book, map, chart, document, manuscript, pamphlet or other material whatsoever of a rare nature shall be permitted to be sent out from the library except on interlibrary loan to a research library under regulations safeguarding the materials during transit and while in use.

(8) Bind except when microfilmed the unbound books, documents, manuscripts, pamphlets, and especially newspaper files in its possession.

(9) Take an active interest in the preservation and use of the noncurrent public records of historical importance of counties, cities, villages, towns, school districts and other local governmental units.

(15) To promote a wider appreciation of the American heritage with particular emphasis on the collection, advancement and dissemination of knowledge of the history of Wisconsin and of the West.

(16) To collect, embody, arrange and preserve in authentic form, a library of books, pamphlets, maps, charts, manuscripts, papers, paintings, statuary, and other materials illustrative of the history of the state.

44.04 School services. (1) The historical society, as part of its program as an educational institution, shall offer to the schools in this state such materials as it shall prepare or make available to facilitate the instruction in the history and civil government of Wisconsin required by s. 118.01 (1).

(2) To this end it may prepare, publish, issue, loan or circulate such magazines, books, aids, guides and other publications, such visual aids, special exhibits, and other teaching materials and aids as it in consultation with the department of public instruction, deems advisable.

43.03 General duties of state superintendent. The state superintendent shall:

(1) Promote, assist and plan the organization, development and improvement of school library media services to provide the resources needed for teaching and learning in the schools.

(2) Promote, assist, plan and coordinate the organization, development and improvement of public library services and public library systems to serve the needs of all citizens in the state.

(3) (a) Plan and coordinate school library media services with other library services and promote interlibrary cooperation and resource sharing between school library media programs and other libraries.

(b) Plan, coordinate, evaluate and set statewide priorities for the development of networks and intertype library cooperation among libraries in the state and by the libraries in the state with libraries and resource providers in other states, and promote interlibrary cooperation and resource sharing between local governments, public libraries and other libraries.

(c) Coordinate and promote the development of regional organizations for interlibrary cooperation and resource sharing among all types of libraries.

(d) Submit to the council on library and network development an annual report which describes the programs and policies carried out under pars. (a) to (c) in the preceding year and the programs and policies to be carried out under pars. (a) to (c) in the succeeding year.

(6) Enter into an annual contract with the public library in a 1st class city for the provision of library services to physically handicapped persons, including the blind and visually handicapped, certified by competent authority as unable to read or use conventional printed materials as a result of physical limitations. For the purpose of this subsection, "competent authority" means any member of the medical or allied professions, and professional persons in the fields of public health, education, library service, rehabilitation, social work and public welfare.

44.06 Depository of public documents. **(1)** The historical society shall be the official public documents depository for this state. Three copies of all printed, mimeographed, or otherwise reproduced state publications, reports, releases and other matter published at the expense of the state shall be sent to the historical society by the department of administration in accordance with s. 35.85 (7). In those instances where a given publication is not distributed by the department of administration, 3 copies shall be sent to the historical society by the department, commission or agency of origin.

(2) The director of the historical society shall file with the department of administration, and may revise, lists of state, county, municipal, federal, or other agencies to which state public printing should be distributed in accordance with interstate or international comity, with or without exchange, as provided in s. 35.86, in order to maintain or enlarge the reference collections of the society and the state. The documents so specified shall be shipped to the addressees directly from the office of the department of administration, carriage charges payable by the state.

(3) The historical society shall keep available to other state agencies and to citizens of Wisconsin and other states its public document collections under such proper and reasonable regulations as may be deemed advisable.

(4) The historical society may loan such documents, except those of rare nature, to other state agencies for official use or on interlibrary loan to other reference libraries under such rules and regulations and for such period as may appear desirable.

(5) The historical society shall prepare a periodic checklist of public documents issued by the state, including all reports, circulars, bulletins and releases issued by the various state departments, boards, commissions and agencies and shall publish this list in such form and with such notes as to show the scope and purpose of such publication.

44.07 Museum extension service.

(2) The said society may for such purpose lend to other museums, public libraries, art galleries, colleges, schools or other responsible institutions or organizations, under such rules and safeguards and for such period as it deems desirable, such items and objects from its collections as are not irreplaceable.

44.09 County, local and court records. The proper officer of any county, city, village, town, school district or other local governmental unit may offer, and the historical society may accept for preservation, title to such noncurrent records as in the historical society's judgment are of permanent historical value and which are no longer needed for administrative purposes by such local governmental unit. The proper officer of any court may offer, and the historical society may accept for preservation, on order of the judge of the court, title to such records as have been photographed or microphotographed or which have been on file for at least 75 years, and which are deemed by the historical society to be of permanent historical value.

44.10 Regional depositories for records. **(1)** The historical society, through its board of curators, in its corporate capacity and as trustee of the state may enter into agreements with the university of Wisconsin system or such other public or quasi-public institutions, agencies or corporations as the board of curators of the society shall designate to serve as the regional records depository for a given area. Said agreements shall specify the area to be served by the depository, and the methods of accessioning, cataloging, care, housing, preservation and servicing of these and such other material as may be placed by the historical society or in the name of the historical society in such regional depositories under such agreements, it being the intent of this section to provide an orderly, uniform state-wide system for the retention and preservation of important court, county and local public records on a manageable basis and under proper professional care in the region of origin. Only where such arrangements cannot be accomplished may the said society transfer such records to the state archives. Said society shall compile and maintain for reference purposes as soon as may be convenient a union list of the records of county, city, village, town, school district, or other local governmental unit, or court, title to which is transferred to it under s. 44.09.

(2) The board of curators may establish county records depositories within the regions served by the regional depositories established in sub. (1). The board may enter into agreements with these county depositories similar to those provided above for regional depositories, and records may be loaned temporarily from regional depository to a county depository, title in all cases remaining in the state society. The union list of records of county, city, village, town, school district or other local governmental units, or court, provided in sub. (1) shall indicate such transfers or loans of records between depositories so as to show at all times the present location of each group of records.

History: 1977 c. 26.

State Historical Society

44.11 Central depository library. The board of curators of the historical society shall have the same authority to participate in the formation and maintenance of a nonprofit-sharing corporation for the purpose of providing and operating a central library depository as is conferred upon the board of regents of the university of Wisconsin system under s. 36.11 (12). Section 36.11 (12) shall, so far as applicable, apply to the board of curators of the historical society and for the purposes of this section whenever the words "board of regents" appear in s. 36.11 (12) they shall be deemed to mean "board of curators of the historical society".

History: 1971 c. 100 s. 23; 1973 c. 335 s. 13.

44.14 Central depository loan collection, federal documents. (1) It is the purpose of this section to establish a more economical system of handling federal documents in this state in such a way as to effect savings of staff and space to the participating libraries, both state and local; to make such documents more available to more of the people, colleges and libraries of the state, in accordance with the purposes of the federal depository act of 1895 and the needs of the citizens of the state; and to make possible substantial economies in the publication costs of such documents at the federal level as well. To this end the state documents depository established by s. 44.06 may acquire and establish a central state depository and loan collection of federal documents for the benefit of the university of Wisconsin system, the state law library, the depository libraries and such other college and public libraries in this state as may desire to share in the benefits of this loan collection.

44.14 (cont.)

(2) The university of Wisconsin system and the public and other participating libraries, federal regulations permitting, may transfer outright or may loan indefinitely to this central depository any or all federal documents now in their possession which in their opinion are so little used for ready reference purposes as to make their retention unnecessary if copies are available on loan from the central depository loan collection.

(3) Documents so transferred may be used by the society to furnish participating libraries with items needed for their permanent reference collections, for the central loan collection, or for exchange, trade or sale in order to make more complete and useful the central loan collection established by this section.

(4) The board of curators may establish such rules governing the loan of books from the central depository loan collection and may make such charges to cover shipping costs as may be deemed necessary and advisable.

History: 1977 c. 26.

State Law Library

758.01 State law library. The supreme court shall maintain a state law library for the use of officers and employes of this state, attorneys and the public. The supreme court may promulgate and enforce rules governing the use of the library and appoint and fix the compensation of a librarian and such staff as is necessary to operate the library.

History: 1971 c. 152 ss. 7, 40; 1971 c. 254 ss. 1, 18; 1977 c. 29; 1977 c. 187 s. 97; Sup. Ct. Order, eff. 1-1-80.

NOTE: The Sup. Ct. Order dated 12-11-79, eff. 1-1-80, states in section 5 that this section is repealed as an equivalent provision is contained in the Supreme Court Rules. See SCR 82.01.

Appendix B

DESCRIPTIONS OF STATUTORY, CONTRACTUAL AND OTHER WISCONSIN STATE LEVEL RESOURCE PROVIDERS*

Statutory Wisconsin State Level Resource Providers

1. LEGISLATIVE REFERENCE BUREAU

A. Statewide Clientele:

Among its various statutory duties, the Legislative Reference Bureau provides reference and library services. Although the bureau's primary responsibility is to the members of the Wisconsin Legislature, Section 13.92 (1) of the Wisconsin Statutes also makes the reference (and library) services available . . . "to public officials, students of government and citizens generally." The bureau's library collection forms the basis for providing reference services. Circulating material may be borrowed in person or through interlibrary loan. Library loan arrangements are also made with legislative service agency libraries of other states.

B. Nature of Materials Collection:

Circulating materials: The bureau maintains a library specializing in the area of state government, with emphasis on items of particular interest to members of the Wisconsin Legislature. Materials include current annual and biennial reports of state government agencies of Wisconsin and other states; selected federal government reports and studies, particularly congressional materials on subjects that impact on states; and studies issued by state and federal agencies and national government associations in such areas of state interest as state finance, taxation, legislative procedure, economic development, education, environmental protention, agriculture, labor relations, state and local transportation, crime, health and social services, intrastate commerce, public utilities, and federalism. Material is cataloged by subject matter and also by author.

Special collections:

Clippings: The bureau maintains an exceptional collection of newspaper and periodical clippings concerning all of the above subject areas. Clippings are pasted on clip sheets, classified by subject matter, tied into the relevant volume of clippings, and shelved along with all other materials on that subject. Within each clipping volume, items are arranged choronologically. On most subjects, the bureau's collection of clippings comprises many volumes (older volumes have been transferred to microfiche). Clippings are not circulated outside the State Capitol.

*The information in Appendix B was supplied by the directors of the libraries represented.

Bill drafting records: The Legislative Reference Bureau is the depository of bill drafting records for legislation introduced in the Wisconsin Legislature since 1927. Bill drafting records consist of the records kept by the attorneys of the Legislative Reference Bureau on each measure introduced. Drafting records are used particularly by attorneys and judges conducting research on the history and intent of legislation and statute sections. For bills enacted into law, the records are organized by session and by session law number (called acts beginning with the 1983 session). Unsuccessful proposals are retained by bill number. The collection is noncirculating; Sec. 13.92 (1)(a)3, stats.

State document collection: The bureau is a depository of Wisconsin state documents. In addition to cataloging most current state documents as part of the regular, circulating collection (organized by subject matter), the bureau maintains a noncirculating state document collection organized by issuing agency.

C. Document Delivery Statewide:

Material in circulating collection of the Legislative Reference Bureau is loaned in person to individuals. Interlibrary loans are made, and loans are made to legislative service agencies in other states.

The state document collection, reference collection and drafting records maintained by the Legislative Reference Bureau are noncirculating. Clippings may be borrowed only by persons employed in the Capitol and must remain within the building.

Limited free copies of Legislative Reference Bureau materials may be made by the bureau's patrons on copy machines available in the bureau. Copies of microfiched drafting records and clippings will be prepared by the bureau for 10 cents per page.

D. Information/Reference Service Statewide:

The Legislative Reference Bureau provides reference and information assistance in the area of state government in general and state legislation in particular to inquiries received in person, by telephone or by mail. Mail may come to the bureau directly, or be referred by other state agencies. The bureau's highest volume areas consist of requests for information on legislation and on the legislative intent of statutes. The bureau assists patrons in using its library, and provides instruction on the use of legislative documents.

The Legislative Reference Bureau conducts information seminars, for attorneys and others involved in legal research, on legislative history and intent. The bureau makes presentations to university classes and senior citizen groups explaining its facilities and services.

E. Specialist or Unique Service Statewide:

The Legislative Reference Bureau issues studies on topics of current interest to members of the Wisconsin Legislature. Such studies are of varying length and are issued as Research Bulletins, Informational Bulletins, and Wisconsin Briefs. Each is on a different topic. The Briefs are usually of an ephemeral nature. The bureau's publications are sent to depository libraries in this state and to legislative service agencies in other states. They are distributed free to individuals upon request as long as the supply lasts.

The Legislative Reference Bureau prepares the biennial WISCONSIN BLUE BOOK for publication in the autumn of each odd-numbered year. The Blue Book is a compendium of information on the state government of Wisconsin and is used by government officials, students, and any other person who wants to understand the structure and function of Wisconsin state government. Copies may be purchased for $2 from Document Sales and Distribution, 202 S. Thornton Avenue, Madison 53702. (Some free copies are distributed to certain government officials and libraries as specified in Section 35.84 of the Wisconsin Statutes.)

The bill drafting records and clipping collections maintined by the Legislative Reference Bureau, both mentioned in item B, constitute unique and important elements of the bureau's services.

F. Funding Sources for Statewide Services:

State GPR funds.

2. REFERENCE AND LOAN LIBRARY

A. Statewide Clientele:

The Reference and Loan Library serves patrons of all types of libraries through local libraries and systems. Requests are received from public, school, academic, vocational-technical, institution, hospital, and other special libraries after they have been referred through public library systems or other designated clearinghouses within system areas. Libraries in areas not served by systems refer requests directly. State agency and state institution libraries also refer requests directly. Individuals are not served directly with the exception of state agency employees in agencies which do not have libraries.

B. Nature of Materials Collection:

Generally, an attempt is made to purchase materials which back up public library system collections while, at the same time, not duplicating the collections of UW-system libraries, the State Historical Society or other libraries with specialized collections. Copies of works normally cataloged as reference materials are also purchased for circulation.

Books: 141,420 volumes
Mixed Media Kits: 995 kits
Phonorecords: 13,221 discs
Audiotapes: 3,894 cassettes
Motion Pictures: 111 reels
Videotapes: 968 tapes
Microfilm: 5,110 reels
Pamphlets: 5,170
Documents: 13,934
Periodicals: 700 titles
Videodiscs: 185 units

Subject area strengths: Print Materials
Technology, arts and crafts, music, art and artists, antiques, library science, civil service exam books, small business operations, automobile, appliance, and electronic equipment repair.

Subject area strengths: Recordings and Audio Tapes
Foreign language instruction, foreign folk music, classical music, jazz, spoken language, American Library Association conference proceedings, management.

Subject area strengths: Videocassettes, Films
Library science, management, microcomputers.

Additional staff expertise: Foreign languages, mechanics, crafts, collectibles, military science, European history, audiovisual materials and equipment.

C. Document Delivery Statewide:

Print and audiovisual materials are loaned from the collection and sent to libraries by mail and occasionally via UPS. Photocopies are sent when necessary and appropriate. When requests for materials cannot be filled from the Reference and Loan collection, requests are referred to WILS, Milwaukee Public Library, state agency libraries or other libraries in Wisconsin who own or may own the material. Requests are referred to libraries out of state when appropriate. Interloan requests are received, referred and responsed to by a variety of methods, including mail, TWX, TWP, terminal, microcomputer and OCLC.

D. Information/Reference Service Statewide:

In addition to filling requests for specific materials, the staff researches requests for reference or subject information. Requests are either filled from the Reference and Loan collection or referred to other specialized sources, including WILS, the UW Engineering Library, state agencies, businesses and other appropriate contacts. Computerized data base searches are conducted on BRS, DIALOG and RLIN, allowing access to hundreds of specialized bibliographic and other information. Requests are handled via mail, telephone, TWX, and TWP.

E. Specialized or Unique Services Statewide:

- Verification of interloan bibliographic information.

  Many requests are referred to the Reference and Loan Library for which the author, title, publisher, date, etc., have not been verified and for which no locations have been found. This is sometimes due to incomplete or inaccurate requests. The staff uses a variety of sources to confirm that materials exist and can be located.

- Government document depository distribution.

  The Reference and Loan Library collects government documents from Wisconsin state agencies and distributes them to 44 Wisconsin libraries serving as government document depositories.

- Statewide data base production and maintenance.

  The Reference and Loan Library administers the contract with a vendor to maintain a computerized data base of bibliographic records of materials owned by Wisconsin libraries.

  A statewide catalog on microfiche is currently developed from the data base and distributed to libraries. Libraries may add holdings information to the data base by using OCLC, providing local computer records or by using the MITINET microcomputer program.

- MITINET development and maintenance.

  MITINET is a microcomputer program designed to allow libraries to add holdings information to bibliographic records in the data base and to add new records to the data base.

- Audiovisual materials booking.

  Selected audiovisual materials may be booked for specific dates.

- Wisconsin Library Film Circuit.

  The Film Circuit is a nonprofit organization, housed at the Reference and Loan Library, and cooperating with it. Film packets are distributed to libraries on a rotating basis. The service is supported by membership dues and staff, and operated by non-state employees.

- Experimentation with new audiovisual equipment and materials.

  The Reference and Loan Library occasionally purchases collections of materials and loans these materials with equipment when an audiovisual format is new or experiemental. This has been done recently with videocassettes and videodiscs.

- State Agency Library Processing Center.

  The Processing Center catalogs and processes library materials using OCLC on behalf of seven state agency libraries. These libraries contract with SALPC and pay for the services.

F. Funding Sources for Statewide Services:

State GPR funds are used for operational costs, including staff, materials, supplies, space rental, and other items.

SALPC is supported by state funds in the form of program revenue supplied by member state agencies.

Federal Library Services and Construction Act funds are used to support the statewide data base and MITINET programs and to pay for additional personnel to handle interloan requests.

A small amount of money is obtained from libraries as payment for lost or damaged materials.

3. STATE HISTORICAL SOCIETY LIBRARY

A. Statewide Clientele:

Primary Clientele:

All residents of the state of Wisconsin.

We are the only library in the state explicitly open, free of charge, to all residents of the state (or anyone else), by Wisconsin law, and circulating to all residents.

We do not have a current breakdown of the types of clientele using our library most frequently, but will generate such data during a user study to be conducted in fiscal year 1984.

All libraries of the state of Wisconsin.

We provide interlibrary loan to all libraries in the state, preferring them to use the statewide interlibrary loan network, accessing us ultimately via WILS.

Many of our special services are aimed at library and librarian needs.

Secondary Clientele: Nationwide

All historian, academic and non-academic, interested in the history of North America.

Amateur and professional genealogists.

Academic and non-academic students of labor, radical, and social reform movements, ethnic and racial minorities, women's studies.

These include officials and members of labor unions, women's groups, ethnic groups, economists, journalists (print and electronic media).

Academic and non-academic students of the press in the United States.

B. Nature of Materials Collection:

Collections:

Printed materials on the history of the United States and Canada, and related fields.

We are especially strong in:
Wisconsin history
The westward movement
Genealogy
Local and family history
Labor and economic history
Social reform and radical movements of the left and right
Ethnic groups, especially those represented in Wisconsin
Black history
Native American history
Women's history
Religious history

Pamphlets and ephemeral printed materials, especially in the above subjects.

Wisconsin newspapers.

We attempt to have a complete run of all newspapers ever published in Wisconsin, and continue subscriptions to all now being published.

General interest newspapers.

We have the second largest collection of newspapers in the United States, after only the Library of Congress. This includes a good collection of newspapers of the original 13 colonies.

Newsletters and periodicals in the following areas:

U.S. and Canadian history and genealogy
Labor unions
Military interests
Women's interests
Black interests
Native American interests
Radical and reform movements

Wisconsin public documents.

We are a full depository for all publications of the state of Wisconsin. We collect selectively in county and municipal publications in Wisconsin.

U.S. Federal documents.

We are (with the University) the Regional Depository for all Wisconsin outside the metropolitan Milwaukee area.

We (or the University) hold a complete collection of federal depository collections.

We hold a complete run of the American Statistics Index non-depository microfiche set. We also hold a set of the Readex non-depository microcards through the early 1970s.

State documents (Non-Wisconsin).

We have an excellent collection of publications of U.S. state governments for the 19th and early 20th centuries.

As a member of the Center for Research Libraries we have access to state publications we do not hold in-house.

Canadian documents.

We are one of only 40 U.S. selective depositories for publications of the Canadian national and provincial governments.

Doctoral dissertations and masters theses.

We actively collect theses and dissertations from all U.S. and Canadian universities in our fields of interest.

Summary:

We have approximately one million printed items.
We have approximately 700,000 microforms.
In terms of volume count, our microform room is the third largest public library in Wisconsin.

C. Document Delivery Statewide:

In person checkout to any resident of the state of Wisconsin.

Interlibrary loan to any bonafide library in Wisconsin (we prefer contact through WILS).

Photocopies, available via interlibrary loan, may be made in person.

Paper copies can be made from paper documents, and all three formats of microform, including microcard.

We have one of the few microcard-to-paper copiers in Wisconsin.

We make and sell microfilm copies of any microform we have made ourselves, subject to copyright law.

We loan monographs and bound serials, all types of government publications, and all formats of microform.

We do not loan high-use items, rare or fragile items, and unbound newspapers or periodicals.

Most of our collection, including microforms, is in open stacks.

We will attempt to borrow upon request, for any resident of the state, within our fields of interest, from any library in the U.S. or Canada.

We are a full member of the Center for Research Libraries.

D. Information/Reference Service Statewide:

We provide reference and information assistance to anyone via telephone, mail or in-person.

We accept direct questions from individuals and referrals from other libraries. We make referrals to other libraries.

Our highest volume questions appear to be in Wisconsin history; genealogy; federal and state statistics; federal and state legislation and regulation. (More detail on this will forthcoming from our user study in fiscal 84.)

We provide instruction in library use, historical research, genealogical research, use of government publications, and related areas to formal classes and informal groups.

Most of our work is with University of Wisconsin-Madison classes and organized Wisconsin genealogical societies.

We also travel within the state and nationally for this purpose.

We provide, from time to time, lectures and full courses over the ETN network and radio stations.

We provide technical advice to other librarians both in Wisconsin and nationwide.

Most of our questions in this area involve the determination of main entry and classification for Wisconsin publications; descriptive cataloging and classificaion of genealogical materials; use and interpretation of the Newspaper Cataloging Manual.

E. Specialized Services:

We produce the monthly Wisconsin Public Documents, a checklist with full cataloging records of publications of the state government. This is cumulated and indexed annually.

We produce a quarterly Wisconsin History Checklist with full publishing information, including price and source of supply. This appears in the Wisconsin Magazine of History.

We fully catalog and classify, on OCLC, dissertations we receive.

> In many cases, we have become the usual source of the original cataloging record, rather than the issuing university.

We do all current cataloging on OCLC, in full MARC/ISBD/AACRII format. These records are contributed to the statewide data base, from which WISCAT is produced.

We send records of all serial holdings to the University of Wisconsin Union List of Serials.

We produce Currently Received Federal Government Depository Publications in Madison, Wisconsin Libraries.

> This is a union list of federal goverment depository items in the Madison area.

We are an original project in the National Newspaper project.

> We are one of the six libraries testing the Newspaper Cataloging Manual and entering, for the first time, full MARC/AACRII newspaper records in an online data base (OCLC); we are a full participating member of CONSER for this project.

The library works with the Historical Society's microfilm lab to film, on an ongoing basis, all Wisconsin newspapers not otherwise available on film.

The library works with the microfilm lab to film deteriorating copies of any newspaper in our collection, as well as any book or pamphlet in our collection in bad condition.

We sell copies of microfilm we have produced to individuals and libraries.

We cooperate with other libraries nationwide to exchange newspapers and newsletters for filming, and for copying, so that the most complete film master is available and copies are available to Wisconsin residents.

We perform all functions of a Regional Depository, including not only interlibrary loan, but assistance with weeding and exchange programs, technical advice, etc.

We maintain a personal name index to the Wisconsin parts of the U.S. Census for 1820 through 1870; we are completing a name index to the entire Wiconsin state census for 1905.

We provide formal main entry information for the Library of Congress Name Authority Project for Wisconsin government agencies.

F. Funding Sources:

State (GPR)
Federal (varies, includes NEH, HEA, LSCA)
Program (library sales, fines, lost book charges)
Gifts (in cash and in kind)
Endowment income

We are NOT part of the University of Wisconsin and are not budgeted out of any University funds. We do receive an allocation from WILS for our contribution to their programs. We have received significant gifts from the University.

4. STATE LAW LIBRARY

A. Statewide Clientele:

The Supreme Court is directed under 1981-82 Wisconsin Statutes s 758.01 to "maintain a state law library for the use of the officers and employes of this state, attorneys and the public." We estimate that even though our first obligation is to serve the Wisconsin Supreme Court (as our governing body), only 8 percent of our use generates from both the Supreme Court and the Court of Appeals. Our greatest use (nearly 75 percent) is from practicing attorneys and judges throughout the state. The remaining 17 percent of use is from legislative and state agency personnel, as well as the general public.

B. Nature of Materials Collection:

The State Law Library collection is almost exclusively a legal one, consisting of approximately 153,000 volumes including 3,000 reels of microfilm and nearly 65,000 microfiche. The core of the collection contains the session laws and statutory codes, court reports, administrative rules and legal indexes and digests for the federal government, the 50 states and the U.S. territories. The library also maintains a large collection of legal periodicals and bar journals (over 550 current journals); a legal treatise and loose-leaf service collection; a government documents section (we are a selective federal depository); and statutory and case law from England.

C. Document Delivery Statewide:

Although the library has always been open to the public, until 1976 circulation of its materials was prohibited. At that time, in an agreement with the Court requiring that upon request by a Court

member, any material would be available for their use, the Court allowed limited circulation to judges, attorneys, legislators and state agency personnel within the local area.

Because of this agreement we cannot, therefore, loan materials via regular interloan systems. In lieu of mail loan, we are currently providing nearly 20,000 pages of photocopy per month. In addition, we have reader-printers for films or fiche copies, as well as the ability for fiche-to-fiche duplication.

D. Information/Reference Service Statewide:

The State Law Library is open between 8:00 a.m. and 5:00 p.m. to anyone wishing to use its resources and facilities. Because of the need to have local materials available to attorneys and judges not in the local area, the library is also accessible after hours to any member of the Wisconsin State Bar Association upon presentation to the Capitol police of his/her current Bar membership card.

Athough the staff is well trained in legal bibliography and legal reference and research, the library strictly adheres to a code of professional ethics which requires that law librarians not render legal opinions, give legal advice, or interpret statutory or case law in any way which may be construed as the practice of law.

We will, however, provide users with the appropriate legal materials or, for materials unavailable in the State Law Library, direct users to other libraries or agencies able to fill their request. We estimate that we currently fill approximately 500 to 600 requests per month. Within the year the catalog of the State Law Library will be part of WISCAT. The distribution of WISCAT will encourage greater statewide use of the State Law Library's resources, particularly by many public libraries.

E. Specialized or Unique Services Statewide:

Other than the special collections mentioned in #2, the State Law Library provides no specialized services.

F. Funding Sources for Statewide Services:

The State Law Library had a total 1982-83 budget for personnel, supplies and capital outlay (books and equipment) of $307,000 for FY 83.

Contractual Wisconsin State Level Resource Providers

1. COOPERATIVE CHILDREN'S BOOK CENTER

A. Statewide Clientele:

The Cooperative Children's Book Center is an examination, study and research library in the field of children's literature and provides to Wisconsin librarians (school and public libraries), teachers

(public and private, preschool through college/university and vocational/technical schools), students and other adults educational and informational services about children's literature. The Outreach Librarian/Consultant at the CCBC provides consulting services to public libraries in Wisconsin about library services to children and young adults.

B. Nature of the Materials Collection:

The Center's collection includes:

- newly published children's and young adult trade books
- a core collection of recommended children's and young adult trade books
- a collection of historical children's books
- reference and bibliographic materials related to children's and young adult literature
- a collection of materials about and by Wisconsin authors and illustrators of children's books
- an alternative press publishing collection for children

C. Document Delivery Statewide:

The Book Center provides on-site use of book resources, sends free resources to anyone in Wisconsin who requests them, loans certain materials for two-week periods by prior reservation, and takes materials for examination to regional, district, system and state professional meetings on a regular basis.

D. Information/Reference Service Statewide:

Reference services are available by mail, by phone and on a walk-in basis. Intellectual freedom information services are provided at once by phone or by return mail as requested and take priority over other requests for information.

E. Specialized or Unique Services Statewide:

Since this is a specialized collection which provides services statewide and nationally, all of the above fit into this category. Most unique are the intellecutal freedom information services; the Alternative Press Publishing Collection and materials which may be borrowed; the circulating materials about Wisconsin authors and book evaluation; the workshops and conferences and ETNs designed to meet current information needs in Wisconsin; and the individually developed bibliographies available free to all.

F. Funding Sources for Statewide Services:

The Division for Library Services of the State Department of Public Instruction provides a half-time outreach librarian/consultant; a full-time secretary; all funds for books, periodicals and capital expenses and all operational funds (phone, postage, printing, travel, etc.). The UW-Madison provides the facility. The UW-Madison Library

School provides one-half of the director's salary and money for part-time hourly staff; the UW-Madison School of Education does likewise.

2. MILWAUKEE PUBLIC LIBRARY

A. Statewide Clientele:

As a contractual state level resource provider, Milwaukee Public Library serves all libraries in Wisconsin whose requests are referred by the Reference and Loan Library, the Wisconsin Interlibrary Services, or organizations designated as direct access libraries or area clearinghouses according to the Wisconsin Interlibrary Loan Guidelines.

B. Nature of Materials Collection:

Milwaukee Public Library lends adult and children's books; annuals; transactions; proceedings; monographic series; newspapers on microfilm; sheet music; government documents; phonograph records; maps; pamphlets; photographs. The Library copies patents and standards, periodical articles, and other material from non-circulating collections. The Library microcopies articles from films and makes fiche-to-fiche copy.

C. Document Delivery Statewide:

Milwaukee Public Library lends federal, state, and local documents. Federal documents on microcard can be loaned; those on microfiche are copied fiche-to-fiche.

D. Information/Reference Service Statewide:

At this time insufficient funding of the state grant does not allow the Milwaukee Public Library to provide information/reference service statewide.

E. Specialized or Unique Services Statewide:

Statewide specialized or unique services provided by Milwaukee Public Library include the loan of government documents; sheet music; newspapers on microfilm; books in foreign languages and instructional materials for those to whom English is a second language. Photocopies of United States and British patents; United States, British, and selected German standards; and material from genealogical, marine and local history are other specialized or unique services provided by the Library.

F. Funding Sources for Statewide Service:

Milwaukee Public Library's Interlibrary Loan Service is funded by an annual grant from the state of Wisconsin.

3. WILS (UW-MADISON/COWL)

A. Statewide Clientele:

WILS is a membership cooperative providing library and information resource sharing services. Primary service areas are interlibrary loan and document delivery, reference service, access to and training and support for the OCLC online system.

From a broad perspective, the community served by WILS includes all libraries and information centers within the state of Wisconsin. Any library is eligible for membership in the WILS network. At the present time participation varies with the different WILS service areas. That is, academic and special libraries are direct participants in the interloan and reference service program as well as the OCLC service program. Public and school libraries are direct participants in the OCLC program, but receive interloan and reference services through a contractual arrangement between WILS and the State Division for Library Services*.

Under this contractual relationship WILS is a secondary resource for public and school libraries with the Division for Library Services, Reference and Loan Library serving as the primary resource. The reason for this arrangement is that it is the Reference and Loan Library which is designed to serve public and school libraries while WILS provides services through an academic library resource -- the University of Wisconsin-Madison --which does not maintain a collection designed to meet public and school library information needs.

Participants in the WILS network, as of June 1983, includes one hundred and forty three libraries for OCLC and related services, forty nine academic and special libraries participating directly in the interloan and reference service program, and, approximately four hundred public and school libraries participating through the contract with the Division for Library Services.

B. Nature of Materials Collection:

See C below.

C. Document Delivery Statewide:

The primary purpose of the WILS interloan/document delivery network is to provide access to the resources of the libraries on the campus of the University of Wisconsin-Madison. Requests for materials received from libraries throughout the state are searched daily in the twenty two campus libraries and the State Historical Society. The materials located are then shipped to the requesting library. Requests for materials which are not owned in the Madison campus area are referred to other libraries in the state which are identified as owning the requested items. WILS also has a reciprocal borrowing

*NOTE: See page 5 for an explanation of this contract.

arrangement with the state of Minnesota through its counterpart network MINITEX, and with the University of Illinois and the Illinois State Library. The volume of requests received annually is approximately ninety thousand. Of this number an average of seventy five percent are filled on the Madison campus or at the State Historical Society.

D. Information/Reference Service Statewide:

The WILS Reference Services is intended to complement the document delivery service by providing access to information as opposed to providing specific titles on request. This service is also based upon the resources of the Madison campus, both in terms of published materials and the human resources of campus subject specialists. In addition to "standard" reference service, WILS also provides data base searching for those libraries which do not have access to such services.

E. Specialized or Unique Services Statewide:

WILS is the contracting agent for the state of Wisconsin with the Online Computer Library Center, OCLC, located in Ohio. This is a centralized automation service which provides online cataloging, acquisitions, and related services for libraries throughout the entire United States. As the contracting agent, WILS trains librarians in the use of the system, provides ongoing support to participating libraries, and serves as the liaison between libraries in Wisconsin and OCLC staff.

F. Funding Sources for Statewide Services.

WILS is governed by the Council of Wisconsin Libraries, Inc., a not-for-profit corporation representing all library and information resources within the State of Wisconsin. WILS is operated by the University of Wisconsin-Madison through a contract between the Council and the University and is located within the Memorial Library on the Madison campus.

The primary source of funding for WILS is fees paid by participating libraries for the services received. All direct operating costs are supported by such fees. Indirect costs are supported by the Madison campus. The contract with the Division for Library Services supports the fees for document delivery and reference serices provided to public and school libraries.

4. WISCONSIN REGIONAL LIBRARY FOR THE BLIND AND PHYSICALLY HANDICAPPED

A. Statewide Clientele:

The Regional Library serves all residents of the state of Wisconsin who are certified by a competent professional to be eligible for service. This includes the blind and visually handicapped, persons whose physical handicap prevents them from reading standard print, e.g., a person unable to hold a book, and those with reading disabilities which stem from a physical handicap.

B. Nature of Materials Collection:

The collection consists of multiple copies of about 22,000 titles in braille, hard and flexi-disc, and cassette. These are almost all provided by the Library of Congress, but there are plans to build small collections of locally produced materials and commercial recordings. The locally produced material will concentrate on books on Wisconsin or places in Wisconsin and writing by Wisconsin authors.

C. Document Delivery Statewide:

The Regional Library sends its specialized materials to the blind and physically handicapped statewide through the mail. The Library has a mailing privilege for sending materials. Library patrons can also walk in and use the Regional Library.

D. Information/Reference Service Statewide:

There has been little request for direct reference service to our patrons. We, of course, provide materials on specific requested subjects. On occasion, a patron will call with a question and librarians will provide reference information either from the Milwaukee Public Library collection or by checking catalogs. Our most frequent request from patrons is where to purchase certain types of equipment or appliances.

E. Specialized or Unique Services Statewide:

Our whole program is a specialized or unique service with material appropriate for serving a specialized clientele on a statewide basis.

F. Funding Sources for Statewide Services:

Funding for the statewide services comes from state funds through the Division for Library Services of the Department of Public Instruction. This money pays for staffing, equipment, and such services as telephones and computer fees. Material -- both books and magazines -- as well as the machines to play them on -- comes from the Library of Congress. The Regional Library is administered as a unit of the Milwaukee Public Library, and as such, is provided space, heat, and lights as well as some administrative costs through the library.

Other Wisconsin State Level Resource Providers

1. WISCONSIN DISSEMINATION PROJECT (WDP)

A. Statewide Clientele:

DPI administration and professional staff

K-12 administrators and teachers of Wisconsin

B. Nature of Materials Collection:

Access to data bases of BRS and Dialog; primary use of education related data bases

Access to DPI Library, including ERIC microfiche collection

Office files of research and development reports, newsletters, ERIC clearinghouse products, other current education information

C. Document Delivery Statewide:

Data base search printouts are mailed to school districts

ERIC microfiche are copied fiche to fiche and sent directly to school district

Office file material is included with printouts and sent to school districts

Interlibrary loan requests for journal articles or monographs which are follow-up from printouts are directed to regular interloan channels

D. Reference/Information Service Statewide:

Online searches are the primary reference service of WDP

Referral is made to DPI subject consultants as appropriate

Referral to other specialized libraries and information services as appropriate

E. Specialized or Unique Services Statewide:

WDP has established a network of local district contact people who are generally school media staff. These people receive inservice training at least once a year to help their school districts understand and use the service.

The professional information needs for K-12 educators is addressed statewide by WDP. The fact that the service charges user fees prevents complete statewide service.

WDP has consistently assisted school personnel to become familiar with and use the library systems for document delivery.

WDP works with DPI subject consultants to develop bibliographies, information packages and publications which address current needs of K-12 educators.

F. Funding Sources for Statewide Services:

Two professional staff positions and office and searches for DPI expenses are funded by SEA block grant money.

Searching costs, inservice and travel costs are partially funded through school districts and CESAs paying for service. User fees.

2. INFORMATION SERVICES DIVISION (ISD)

A. Statewide Clientele:

Information Services Division, jointly sponsored by the University of Wisconsin-Madison University Industry Research Program and the Kurt F. Wendt Library, is a "one-stop" cost recovery scientific, technical and business related information service. Established eighteen years ago to serve some of Wisconsin's business and industrial information needs, ISD now provides a full range of library and reference services to over 600 companies throughout the United States and abroad.

In keeping with ISD's policy of confidentiality, client companies are not identified. However, users range from a "one person" consulting service to firms that are part of large conglomerates having their own libraries and information centers.

B. Nature of Materials Collection:

The University of Wisconsin-Madison library system with its four and one-half million books, 53,000 journal titles and excellent collection of standards, specifications, reports, and documents, plus a complete collection of U.S. patents, can supply over 90% of ISD requested material. If the material is not on campus or in Madison, and the client can bear with the time lag, ISD will procure the needed material regardless of where it is located.

C. Document Delivery Statewide:

Adhering to copyright laws and the lending policies of the U.W.-Madison libraries, ISD provides 24- to 48-hour turnaround service for materials available on campus. Photocopy and literature searches are sent first class mail and books are sent library or book rate. Clients may request materials to be sent courier or express service. Sometimes information is transmitted via telephone (by conversation or data transmission).

D. Information/Reference Service Statement:

Wisconsin business and industrial libraries and information centers use ISD for reference and ready reference questions. Individual clients without company libraries or information centers are also provided with the same service. Verification of citations is not required. Requests are accepted via ALA form, letter, telephone, OCLC and TWX.

If the client can tolerate a delay, ISD stays with a question until it finds either the answer or a University subject expert who can provide it.

E. Specialized or Unique Services Statewide:

ISD's strength lies in its close and continuing interaction with its clients. Where company libraries exist ISD provides needed supplemental services; where company libraries do not exist ISD provides whatever information services are needed. ISD has instant access to several hundred computerized data bases. Fees range from $15.00 for a basic on-line patent verification to several hundred dollars for searches involving numerous concepts and averaging three to five different sources. Manual reference and literature searching is also done when required. Specially trained ISD staff quickly identifies and procures patents, specifications, and standards.

ISD offers Wisconsin based companies professional library consulting and from time to time organizes workshops on topics that are of current interest to special librarians or information managers.

Within the past two years reference has gradually expanded to consulting for non-library personnel seeking specific information. A marketing specialist, research and development engineer, or an attorney, for example, can make an appointment to visit ISD's offices to discuss information needs and plan an approach that is within an allotted budget. ISD determines the scope of the problem, the kinds of material and data to be expected, the probable search sequence and the approximate cost.

In the majority of such cases ISD is given a "go ahead" on the project. Occasionally clients may elect to do some of the searching themselves; ISD will help by providing the location of the materials, perhaps a map of the campus or a referral to a local library and, if necessary, instructions on how to use certain indexes or abstracts. Wisconsin libraries served by Reference and Loan have access to all ISD services through Reference and Loan. Referred Reference and Loan requests are handled exactly like any other client's requests and are billed accordingly.

F. Funding Sources for Statewide Services:

ISD operates on a "cost-recovery" basis, receiving its support from the U.W. College of Engineering and the University Industry Research Program. Basically a non-profit service, ISD charges users according to the quantity and nature of the information needed and the staff time involved.

3. UW-MADISON CENTER FOR HEALTH SCIENCES LIBRARY

A. Statewide Clientele:

Since the mid-twenties the UW Medical School Library has furnished documents and reference service to members of the health care community throughout the state. Although the Medical Library Service was initially a service to physicans, it has for many years been widely available not only to the full range of health professionals (including but not limited to nurses, technicians, therapists, administrators, physicians, planners, students and scholars among others) but to patients and other consumers of health information as well. Before WILS and th Division for Library Services took responsibility for serving Wi onsin's academic and school communities, MLS served these user directly as well. Now service to these last two groups is provide ndirectly through WILS and DLS. Currently the largest part of us erved directly are health care providers located in hospitals approach us through their hospital libraries. Others who are in lo practice or are otherwise unaffiliated approach the library individually. We also serve attorneys and some small businesses with health related concerns. Our users approach us by mail, phone and in person, as the library has always had an open access policy for citizens of the state.

Since the mid-sixties the Medical College of Wisconsin has assumed general responsibility for serving the seven southeastern counties of the state. We now provide back-up service for those counties and primary resource library service for the balance of Wisconsin for health related material.

B. Nature of Materials Collection:

Since our primary role is to serve the teaching and research needs of the various schools in the Center for Health Sciences, our collections focus on health related subjects including the basic and clinical medical sciences, nursing, pharmacology, allied health, health care management, administration and planning, and some consumer health education material. The Library houses approximately 200,000 volumes and receives currently over 4,000 titles of journals and serials. In addition it has materials in microform, a substantial collection of audiovisuals and is planning a selection of microcomputer software. Its collection in the history of medicine is widely recognized for its excellence and its collection in the history and development of immunology is outstanding.

C. Document Delivery Statewide:

The CHS collections are widely used through a variety of mechanisms. Walk-in users are welcome. All citizens of Wisconsin may check materials out unless the item is reserved for course use or restricted for security purposes. At present we cannot determine what percentage of our in-house and regular circulation are attributable to statewide use.

Statewide use for which we have statistics include:

Direct loan requests (most of which originate in Wisconsin) ..... + 28,000 (70% fill rate)
Messenger handled requests repor ... + 3,800
Requests filled by WILS with CHS materials 8,000
(about 14% of all WILS requests for the year)

We also provide a referral service for requests we cannot fill within three working days even if the item is owned by the Library. We forward over 7,000 requests per year to other participants in the eleven-state Greater Midwest Regional Medical Library Network or to the National Library of Medicine. Requests from Wisconsin users may also be forwarded to other appropriate Wisconsin networks or agencies when the subject is out of scope for the CHS Library.

D. Information/Reference Service Statewide:

Reference requests are received from the same groups using the document delivery system. In 1981-82 the Library provided 350 manual reference searches (36% for public libraries) and 821 computer searches for statewide users. These include health related queries forwarded by Reference and Loan Library. Because of the sensitive nature of the subject matter this service requires direct contact with the original requestor, a familiarity with the subject matter so that appropriate questions can be asked during the reference interview, and a general awareness of the state of the art so that outdated or misleading information is not provided. Staff may also refer users to other appropriate agencies such as the Clinical Cancer Center or an expert or specialist in the condition for which information was requested.

E. Specialized or Unique Services Statewide:

The CHS Library has been active since the mid-sixties in organizing and upgrading health related information services throughout the state. Through Regional Medical Program and National Library of Medicine grants an intensive program for consulting and education for hospital library staff and hospital administrators resulted in a stronger hospital library system. This was followed by a federally funded program of coordination during which hospital library consortia were formed.

These consortia, which blanket the state, utilize local self-help reference and document delivery programs before calling on state level resources. The CHS Library is presently the sole source of funding for the Wisconsin Health Science Library Coordinator who assists the further development of those consortia. This person is also responsible for working with UW Extension to provide a program of basic and continuing education for hospital librarians. This year the CHS Library in cooperation with the Wisconsin Health Science Library Network Council is facilitating an overall evaluation and planning process for health science consortium and network development in Wisconsin as part of its statewide development program.

F. Funding Sources for Statewide Services:

Initially all work for statewide users, whether program development or document delivery and reference, was cost free to users. With the advent of photocopy machines and their demand for that service, minimal cost recovery efforts were made for that service only. When Wisconsin Regional Medical Program grant money became available the Library was in a good position to apply for funds on the basis of studies it had done on the state of health care libraries in Wisconsin. Support was made available for an early union list, consultant service and educational program. Later, Medical Library Assistant Act money became available through the National Library of Medicine for further consulting, education and developmental efforts and finally for document delivery. After consortia were formed federal money for the Wisconsin Health Science Library Coordinator was withdrawn. Since funding for this position has been the state health science librarians' top priority, University funds have been used to support it while alternative sources are sought. The basic and continuing education programs continue to be planned and prepared by the Coordinator and presented through UW Extension whose reduced funding levels have resulted in substantially higher costs to participants. Over a period of years the document delivery support funds furnished to net-lender resource libraries by the National Library of Medicine's Regional Medical Library Program have been phased out. In its final years the program paid only 2/3 and then 1/3 of the actual cost of providing the service and now pays nothing. Except for minimal photocopy charges and postage for special handling when requested by the user this service remains cost free to the users of our Library and is subsidized by the Center for Health Science Library. Traditional reference services are cost free to users although computerized bibliographic searching is billed at the rate we charge our own users. The only exception to this practice is that we do charge full costs to users from the for-profit sector. Collection support funds are available to us from the state via the University budget. An amount is furnished annually to the UW-Madison and is divided by formula to assist the campus and Historical Society libraries enhance their collections for statewide use. The formula is based on the number of items filled from a specific collection and the number of requests not filled which deal with the subject matter in scope for that library.

Appendix C

STUDY ASSUMPTIONS AND PRINCIPLES

STUDY RECOMMENDATIONS AND COMMENTS

The recommendations in this study are based on certain principles and assumptions. These basic, shared principles and assumptions are included here. This list is not exhaustive, but it does provide some of the information important in the development of the study recommendations.

Assumption: Individual libraries cannot be self-sufficient in these times of budgetary restraints and reductions and increasing user demands for books and other materials and information on a wide variety of subjects.

Principle: Sharing of materials and information among libraries is one way of providing people with needed materials and information. It is an alternative to turning away requests from library patrons. It is a way to equalize access to information for Wisconsin citizens.

Assumption: All libraries have occasion to use other libraries. All libraries have materials and other resources to share.

Principle: Libraries which participate in sharing arrangements as users should be willing to participate as providers.

Assumption: It is often faster and more cost effective to utilize area materials and information before tapping state level resources.

Principle: Materials and information in an area should be explored and utilized before state level resources are tapped. State level resources should be used as a backup to area resources.

Assumption: The materials and information needed by Wisconsin library users are not always available in the library being used.

Principle: There are libraries around the state and at the state level that are needed to fill in gaps for materials and information that are not, and probably should not be, widely owned by many libraries throughout the state.

Assumption: In resource sharing arrangements there are often libraries which give more service than they receive.

Principle: Reciprocal arrangements, without monetary compensation, should be worked out when there are no major imbalances between giving and receiving.

Principle: Libraries that give far more than they receive should be compensated for this service.

Principle: Compensation for sharing within areas of the state should come from system funds or other local or area sources.

Principle: State funding should be available to compensate those libraries at the state level which because of the size and nature of their collections and services are heavily used by libraries from around the state.

Principle: State funding should be available to compensate libraries from around the state which are heavily used by other libraries statewide.

Assumption: Sometimes contractual arrangements by state agencies for statewide library services are necessary to provide access to materials and information that are not available in state level resource libraries with statutory service responsibilities.

Principle: Contractual arrangements should be made only when it is less costly or more efficient to provide a service this way.